

MEMORANDUM FOR: Chairman, Training Board of Visitors

SUBJECT : Training and Supervisors

11/10/73
11/10/73
Training

1. This is an interim report of our monitoring of the development of a training course for middle managers.

2. Attached are three documents which reflect the progress so far in the development of a course or courses. They are an outline by the Task Force of their work to date, a copy of the questionnaire by which the Task Force undertook its survey, and a first draft from the Support School of a course outline. We have met with the Task Force one time and again with the Chairman one time. The Task Force expects to complete its report in satisfaction of its mission as stated in the first paper on or before the 15th of April. As will be evident from a review of the attached documents, the Task Force did not assume nor was it given the responsibility for course development. This perhaps is as it should be, but, regardless, we did not discover this until we felt too late to redirect its efforts. Upon review it appears that this is the wiser procedure, leaving the actual development of a course to the professional educators.

3. The preliminary findings suggest, and we concur, that a single formal course is not the solution to better management in the Agency nor perhaps even to better managers in the "middle". It is to be hoped that the Task Force study will respond in some degree to the question of whether a single managerial style is appropriate or desirable. If not, it will be necessary for the Board or your subcommittee to attempt to resolve that very fundamental question. Closely related to that issue are the system and the criteria for the selection of managers which is a command function and not a training function.

4. We commend to the particular attention of the members of the Board the tentative conclusions expressed in II.B.2. of the attached "The Management Task Force", dated 26 March 1973.

/s/Harry B. Fisher

Harry B. Fisher

Robert S. Wattles

3 Atts

cc: Each Member, Training Board of Visitors, w/Atts
Chairman, Management Task Force, w/Atts

ADMINISTRATIVE — INTERNAL USE ONLY

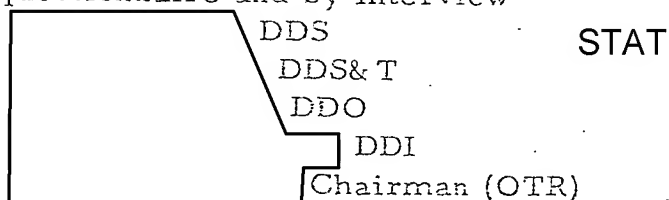
26 March 1973

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THE MANAGEMENT TASK FORCE

I. Background

- A. Authority: Director of Training with cooperation of Deputy Directors
- B. Mission: Identify the training needs of middle managers and make recommendations to the Director of Training
- C. Method: Opinion survey by questionnaire and by interview
- D. Membership of Task Force:



II. Status of Work

- A. Survey
 - 1. 230 questionnaires sent out. Some 78% returned
 - 2. Some 50-60 interviews conducted and recorded
 - 3. Questionnaires and interviews under study
- B. Tentative Conclusions
 - 1. Agency managers have a positive view of the value of training and feel the need for training.
 - a. An across-the-board management course appears to be indicated. The subject matter of the course would at least include planning, organizing, staffing, directing, controlling, and analysis. (Note: The Office of Training has courses in these fields of management training, but none would necessarily meet the proposed objectives of a middle manager's course. One course is in the planning for late FY 1974 that would meet such objectives: Managerial Budgeting).
 - b. Middle managers tend to want more training for themselves if they see added responsibility in their future; they want more training for their successors than they received themselves.
 - c. Middle managers are aware of existing OTR management courses and have a favorable opinion of these courses. Most have taken at least one of these courses.

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- d. Middle managers have a favorable opinion of external courses, some have attended such courses; others look forward to attending them.
- 2. The favorable opinion managers have of training is heavily conditioned by these considerations:
 - a. Many believe that the learnable elements of management are not necessarily directly teachable.
 - b. Formal training is not considered to be the only form of effective training and may not be the major form desired.
 - c. Attitudes toward training appear to be conditioned by the realities of career development within the various organizations of the Agency.

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QUESTIONNAIRE FOR MIDDLE MANAGERS

The Executive Director-Comptroller has asked the Office of Training to conduct a management training program for middle managers of the Agency. As a first step in developing such a program the Office of Training with the cooperation of the Deputy Directors has formed a Task Force composed of one representative from each of the four Directorates and under the chairmanship of an OTR officer. The mission of the Task Force is to identify the training needs of middle managers and to make recommendations to the Director of Training.

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The Task Force is now soliciting your opinion on the subject of management training for you and your successors.

Return questionnaire by 26 February 1973: Management Task Force
202 Chamber of Commerce Bldg.

Management Task Force representatives

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	OTR (Chairman)
	DDP
	DDI
	DDS&T
	DDS

202 Chamber of Commerce Bldg.

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Age	EOD	How many employees in your unit?	How many supervisors report to you?

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I. From the above list, indicate the areas in which you need training and those in which your successor will need training. Indicate the extent of the training required by checks in the two columns on the right. If the list is not complete as far as your job is concerned, please add as required.

RESPONSIBILITIES

YOUR TRAINING NEEDS

SUCCESSOR'S TRAINING NEEDS

	Much	Some	Little	Much	Some	Little
<u>Planning</u>						
Setting objectives						
Programming						
Budgeting						
Records management						
Other						
<u>Organizing</u>						
Encouraging innovation						
Coordinating						
Allocating resources						
Other						
<u>Staffing</u>						
Selecting personnel						
Career management						
Evaluating performance						
Other						
<u>Directing</u>						
Delegating of authority						
Motivating						
Communicating						
Leadership						
Conference management						
Scheduling of work						
Other						
<u>Controlling</u>						
Developing performance standards						
Measuring results (productivity)						
Counseling						
Disciplining						
Contract management						
Other						
<u>Analysis</u>						
Computer application						
Operations research						
Forecasting techniques						
Other						

- II. To the extent that "experience is the best teacher," how can the Agency insure that potential middle managers get the right experience?

- III. What specific training would you like to have as you look ahead to increased managerial responsibilities?

Additional comments regarding training may be placed on reverse side.

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IV. What is your opinion of existing internal and external training programs and how they relate to your current managerial responsibilities? From among the following courses, rate those which you have attended or with which you are familiar. To what extent are they (1) of Direct Managerial Benefit, or (2) of Indirect Managerial Benefit only, e.g., general orientation, familiarization, personal development?

Check (X) courses attended	(1) DIRECT MANAGERIAL BENEFIT			(2) INDIRECT MANAGERIAL BENEFIT		
	Much	Some	Little	Much	Some	Little
<u>Internal Courses</u>						
Managerial Grid (SMS (Grid))	M	S	L	M	S	L
Fundamentals of Supervision/Management (Management course)	M	S	L	M	S	L
Advanced Management Planning (AMP) (SMS(P))	M	S	L	M	S	L
Midcareer Course	M	S	L	M	S	L
Management Science for Intelligence	M	S	L	M	S	L
Other	M	S	L	M	S	L
<u>External Programs</u>						
Senior Service Schools (Indicate which school)	M	S	L	M	S	L
Program for Management Development (Harvard)	M	S	L	M	S	L
Career Education Awards Program (Formerly NHPA)	M	S	L	M	S	L
Executive Seminar Center Programs (CSC)	M	S	L	M	S	L
Foreign Affairs Executive Seminar	M	S	L	M	S	L
Other	M	S	L	M	S	L

Additional comments regarding existing courses may be placed on reversed side.

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23 March 1973

MEMORANDUM FOR: Chief, Support School

SUBJECT : Advanced Management Course

1. In order to proceed with the planning, initial draft of the training design, for the Agency middle-manager course -- tentatively entitled Advanced Management -- a draft proposal consisting of Unit descriptions is attached. Further, as part of the Support School's Action Plans in response to OTR's FY'75 Program Call objectives, the Advanced Management course has been scheduled for three runnings in FY'74: September, February and June.

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2. Significant findings of the Management Training Task Force, whose work is completed with the submission of a summary report on 15 April 1973, will be reflected in the final course design.

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Deputy Chief, Support School
Management Training

Attachments:

- A. Course Objectives
- B. Course Unit Descriptions

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ADVANCED MANAGEMENT COURSE

OBJECTIVE: To improve the managerial competence of Agency middle managers.

SUB-OBJECTIVES: As a result of active participation in exercises involving case studies, films, team activities, role-playing and discussion with guest speakers, the participant will be able to:

- a. Function more effectively as a team leader and team member.
- b. Plan more effectively through understanding Management by Objectives as a system and its application to the organization hierarchy.
- c. Communicate more effectively and guide his subordinates in effective communication.
- d. Better utilize problem-solving/decision-making methods in his work.
- e. Understand the theory and application of Organization Development as it relates to the Agency's managerial philosophy.
- f. Indoctrinate subordinates in the techniques of goal setting.

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g. Improve his performance and the performance
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of his subordinates through application of

motivation theory.

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A. MOTIVATION

Substance: Provide a practical understanding of human motivation:

(1) to understand the broad outlines of the major motivational theories; (2) to help managers to acquire insight into their own behavior; and (3) to portray the significance of motivation in day-to-day management.

Instructional Format: Staff lecture and staff/student discussion; films and discussion; and guest speaker/student discussion.

Guest Speaker: Representative from Psychological Services Staff, Office of Medical Services.

B. PROBLEM-SOLVING/DECISION-MAKING

Substance: Review of the five steps in problem-solving; the Kepner-Tregoe approach to problem-solving/decision-making; and how to evaluate one's self as a decision maker.

Instructional Format: Staff lecture and staff/student discussion; case studies; and guest speaker/student discussion.

Guest Speaker: Deputy Director for Support or Assistant Deputy

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of his subordinates as problem solvers and
decision makers.

C. GROUP DYNAMICS

Substance: Understanding individual and group dynamics; groups
in the formal and informal organization; team approach
to work; and the sociogram display.

Instructional Format: Staff lecture and staff/student discussion;
team exercise; and individual work.

D. PERCEPTION

Substance: How People Perceive and the Role of Perception in
Human Relations (a program-assisted-instruction);
manager-subordinate relations and perception; and
perception and problem people.

Instructional Format: Program-assisted-instruction; staff/student
discussion; and a film.

E. LEADERSHIP STYLE

Substance: Three basic styles of leadership; review of Managerial
Grid styles; "permissive" to "authoritarian" - is there a
"best" style?; and leadership in the Agency today.

Instructional Format: Team activity; staff/student discussion;
guest speaker.

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Leadership in the Agency today.

F. RESPONSIBILITY FOR SUBORDINATES

Substance: Punishment and reward; personnel development
(training and rotational assignment); delegation; and
the manager and his next-in-line.

Instructional Format: Films; team activity; role-playing; and
staff/student discussion.

G. UNIT I SUMMARY

Substance: The Meredith Story: a variety of inter-personal problems
and activity in an Agency-like setting.

Instructional Format: A simulation: (1) in-box material; (2) Video
Tape vignettes; (3) role-playing; (4) case
study; and (5) team activity.

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UNIT II: COMMUNICATION 2 Days

A. THE INDIVIDUAL AND COMMUNICATION

Substance: Problems in speaking and writing; pleasant and unpleasant exchange (confronting conflict); peer, subordinate, and superior relations through communication.

Instructional Format: Films; team activity; staff/student discussion; and use of video tape.

B. ORGANIZATION COMMUNICATION

Substance: Upward/Downward communication; formal and informal (grapevine) communication; and "wiring diagrams", and communication.

Instructional Format: Team activity; film; individual work; Staff/student discussion based on readings.

C. LISTENING

Substance: One-to-one listening; listening in a group; selective listening; and listening as a technique of good management.

Instructional Format: Audio cassette; individual work; team activity; film; and staff/student discussion.

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D. NONVERBAL COMMUNICATION

Substance: The book: Body Language; actions speak louder than words; and what one doesn't say, as communication.

Instructional Format: Staff/student discussion of the book:

Body Language; team activity; and film.

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UNIT III: GOAL SETTING

2 Days

A. GOAL SETTING

Substance: Organizational goals; unit goals; individual goals;
and the manager and goal setting.

Instructional Format: Staff/student discussion of selected readings;
team activity; and individual work.

B. PERFORMANCE APPRAISAL

Substance: Performance appraisal and goal setting; the Fitness
Report as a vehicle for goal setting; and improving
the practice of goal setting.

Instructional Format: Reading materials; team activity; case
study and staff/student discussion.

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UNIT IV: MANAGEMENT BY OBJECTIVES (MBO) 1/2 Day

MBO

Substance: Theories of MBO as expressed by Drucker and Odiorne;
Agency Program Call and MBO; and MBO in the
Federal Government.

Instructional Format: Selected readings; staff/student discussion;
and guest speaker.

Guest Speaker: From the staff of the Federal Executive Institute
or the Civil Service Commission's General
Management Training Center.

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UNIT V: ORGANIZATION DEVELOPMENT (OD)

1/2 Day

OD

Substance: Review of Robert Blake's six steps for OD (of which the Managerial Grid is #1); team building and team critique; and OD, and the Agency.

Instructional Format: Staff/student discussion; team activity and film.

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UNIT VI: AGENCY REQUIREMENTS

1 Day

AGENCY REQUIREMENTS

Substance: IG services to the Agency manager; problem people
and the manager; EEO and the manager; Headquarters

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and Agency Personnel Development

Program.

Instructional Format: Guest speakers; team activity; and individual
activity.

Guest Speakers: Representative of IG Staff; Agency EEO coordinator;
and Director or Deputy Director, Office of
Personnel.

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MANAGEMENT SCIENCE

Substance: Theory of systems and systems analysis; operations research; computer applications; forecasting; and modeling.

Instructional Format: Films; guest speakers; individual work; and team activity.

Guest Speakers (alternatives): Staff member from the Information Science Center.

Consultant:

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Member of the Office of Computer Services Training Staff.

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UNIT VIII: REVIEW OF GENERAL MANAGEMENT FUNCTIONS 2 Days

A. PLANNING & CONTROL

Substance: Theory of planning and control of work; the planning cycle; and implementation of plans.

Instructional Format: Team activity; staff lecture; and staff/student discussion.

B. PRODUCTIVITY

Substance: Identifying production; monitoring production; and measuring and evaluating production against predetermined goals.

Instructional Format: Staff/student discussion of selected readings; team exercise; guest speaker.

Guest Speaker: Representative from the Office of Planning, Programming and Budgeting.

C. MANAGEMENT OF TIME

Substance: Time as a resource; waste of time; analyzing one's use of time; and finding time to think.

Instructional Format: Film; individual work; team work; and discussion of selected readings.

D. CREATIVITY AND INNOVATION

Substance: One's own applications of creative and innovative thinking at work; encouraging creativity and innovation in subordinates; and lateral thinking.

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Instructional Format: Individual work; team work; and staff/
student discussion of selected readings.

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UNIT IX: SPECIAL MANAGEMENT FUNCTIONS

2 Days

A. RECORDS MANAGEMENT - RECORDS DISPOSAL SEMINAR

Substance: Reduction of the volume of office records: (1) a records inventory; (2) preparation of a records disposition schedule; (3) retirement of inactive records; (4) transfer of permanent records to Agency archives; and (5) destruction of obsolete files and non-record materials.

Instructional Format: Guest speaker; individual work; and team work.

Guest Speaker: Agency records specialist (in person or on video tape).

B. BUDGETING FOR MANAGERS

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Note: Mr. [] is designing a budgeting course for managers -- the title above is not certain -- which we hope will be appropriate to the needs of participants in the Advanced Management course.

An alternative to Mr. [] course would be a guest speaker from the Office of Finance, appropriate reading, and individual or team activity. 25X1

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